ONLINE FILING INSTRUCTIONS
FORM 1265

1. To get started, type the following address to access the online tax filing system:
    www.ldi.state.la.us/companyaccess/access_login.asp

2. The top of the next screen reads "IndustryAccess Login" and requires a User Type, User ID and Password. Complete it as follows:

    User Type: Producer (choose this word from the drop down box, if not already showing)
    User ID: (type in your producer number)
    Password: (type in your password)

    NOTE: The Password has been computer generated randomly and may be changed after initial login.

3. This step applies to first-time filers only.

    After your <u>first</u> login, the next screen to appear requests Personal Web Account Information. If you are filing on behalf of a corporation, type the name, e-mail address, and phone number of the authorized person completing the filing in the relevant spaces provided. The mailing address should be that of the corporation. If you are an individual, type your information in the relevant spaces provided. The e-mail address is being requested in order to forward an electronic delivery message to the filer.

4. The next screen to appear affords the opportunity to choose "Online Forms", "Change Password", and "Update Your Profile". To access Form 1265, choose "Online Forms".

5. On the screen appearing next, choose "Complete the 1265".

6. The "Verify Your Contact Information" screen is next to appear. If <u>your</u> name is already listed on the left side of the screen, click on it and review your contact information, which has been retained from a previous filing, making any changes necessary. Click the "Update" button (if actual changes were made), then the "Continue" button. If your name does not appear, then fill out the relevant information, and then click "Create". Be sure to fill out the telephone numbers in the correct format. Click "Continue".

7. Next up is the "Online 1265 Home" screen and contains the options to "Create a New 1265 Filing" or "Modify/View an Existing 1265 Form". If the "Modify/View…" option is chosen, the "Existing 1265 Forms" screen appears and contains information on filings, which have already been created. To create a new filing, not already existing on this screen, use your mouse to click on "Online 1265" located in the light blue banner towards the top of this screen, then click on "Create a New 1265 Filing".

8. On the next screen, "New 1265 Form", first choose the "Year" relevant to the filing you are creating. Next, choose the relevant "Quarter" and then click on the "Create" button.

9. The next screen, "Surplus Line Producer's Quarterly Tax Statement", is the first screen of the actual Form 1265 and is also referred to as the Summary screen. To enter taxable premiums, click "Open/Edit Details". If you have zero premiums to report for the quarter, just click on "Submit 1265" and follow instructions listed in Item 11 beginning with the sentence "Click on Submit 1265 and read…"

10. The next screen to appear is the screen where the details on all quarterly transactions are to be reported. Each data row must contain the NAIC number of the insurer and the respective premium amount placed in either the "On-Time" field for on-time transactions or in the "Late" field for those transactions with an effective date falling before the current filing quarter. Press the "Add Line" button located to the right of the "Late" field to store the data for that row. Repeat this process to enter all rows of data for the quarter.

    Policy Fees, not included in premium amounts, may be reported by clicking on the "Edit" button to the right of "Taxable Policy Fees" located in the gray box below the detail entry area.

    NOTE: After the first row of data is entered and the "Add Line" button pressed, the system's auto save function is activated saving your entries after every additional row is added or edited. This screen will update as data is entered and the box located below the detail entry area will show a compilation of all the data entered so far. To

edit any entry, simply click on the "Edit" button located to the right side of the data row needing the correction and enter the correction. To completely delete any entry, click the "Delete" button, located next to the "Edit" button.

After all transactions and/or policy fees have been entered, click on the "Return to Summary" button located at the bottom of the screen and be returned to the summary page. Upon returning to the summary page, notice that the premiums reported on the detail screen have been summed and the totals placed in their respective boxes and all calculations relative to those premiums have automatically been performed.

If all is correct, click the "Save Changes" button on the bottom of the screen to proceed. If all is not correct, click "Open/Edit Details" again and adjust the respective entry or entries.

11. Lastly, view your return and print the desired number of copies by clicking "Printable Version". Use the printer icon just above and to the left of the state's seal to initiate printing. After printing is complete, return to the previous screen by using your browser's "Back" button. Click on "Submit 1265" and read the "Terms of 1265 (yr/qtr) Submission" which appear on the next screen. Either click "Agree" or "Disagree". If you click "Agree", your filing will be locked and sent to the Department. If you click "Disagree", you will be returned to the "Surplus Line Producer's Quarterly Tax Statement" screen and your filing will not be sent to the Department and will remain in the "Open" status, until changes are made enabling you to "Agree".

12. Send one copy of Page 1 of the printed form with your remittance check attached to the Louisiana Department of Insurance.

IF AT ANY TIME, EITHER BEFORE STARTING OR DURING THE PROCESS YOU NEED ASSISTANCE, PLEASE CONTACT A TAX DIVISION STAFF MEMBER AT:
taxdivision@ldi.state.la.us